Google

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Google Play Business Model

https://docs.google.com/presentation/d/13o9CLUjejGPaco9vLmlI2M4f3dWmpRA7Rq3go0vQJKk/edit#slide=id.g591468f0fc_2_20

Discussion Document
19 Aug 2020

ATTORNEY CLIENT PRIVILEGED

EXHIBIT 939.R

Contents

Play operates at scale: Over 2B users with ~$15B in 2020 ARR, growing 32% Y/Y

28DA Browsers
2.2B
+13% Y/Y

2020 Forecast

Consumer Spend
$37.9B
+32% Y/Y

Revenue*
$15B
+32% Y/Y

Operating Profit*
$9.2B
65% margin, +30% Y/Y

2020F Consumer spend / Revenue represents actuals from Jan - July 2020 and forecasts from Aug- Dec 2020 | Operating profit represent v7 Forecast
* inclusive of *$3.4B of ads revenue*

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Slide 3

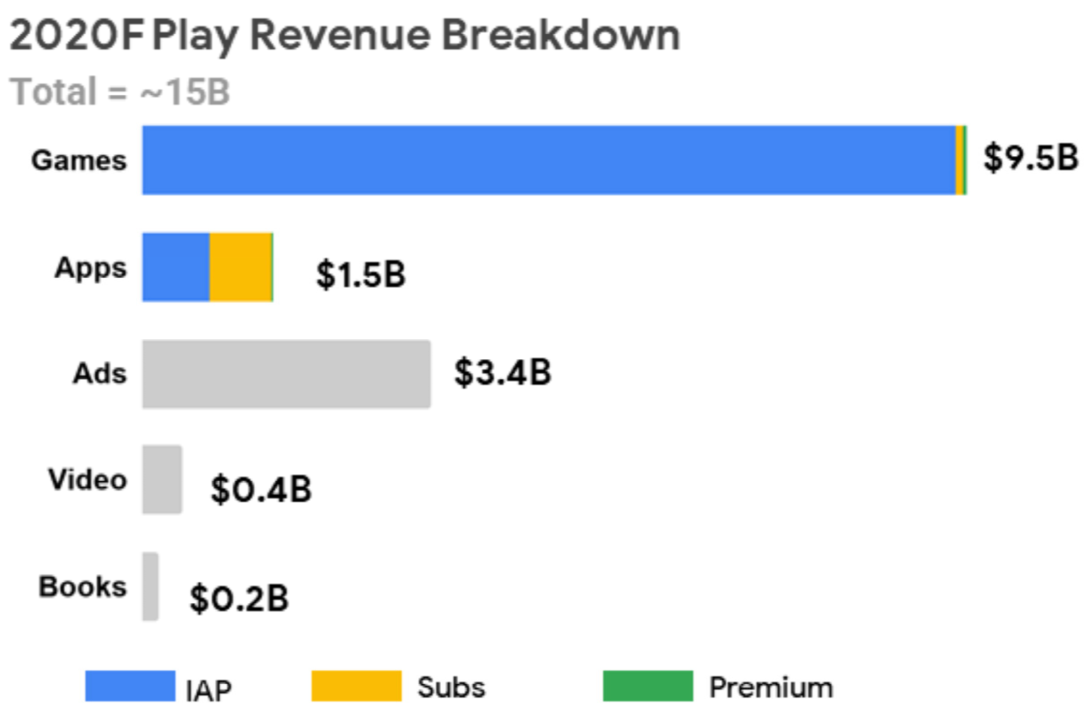
1 Paul Feng google.com

can someone remind me how many FOPs we create a year and what % of overall FOP additions that is for Google?
Sameer Samat, 8/20/2020

1 We're working on this....
Paul Feng, 8/20/2020

Play revenue driven by IAP (~68%), Ads (~22%), Subs (~5%), Premium (~0.4%), & video/books (~4%)

Games contribute ~90%



2020F represents actuals from Jan - July 2020 and forecasts for Aug - Dec 2020

Source data

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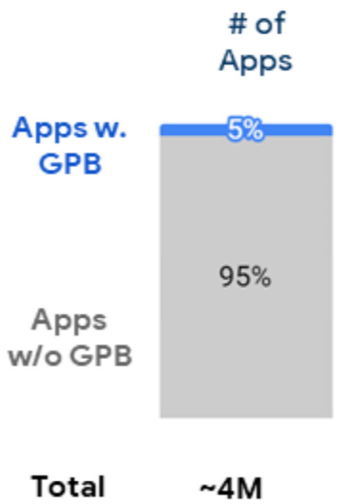
- Notes on Non-financial metrics definition, data limitations and extrapolation assumptions
- “Apps w. GPB” : Monetized apps with spend > $0 for H1’20 at app package level.
- Ads Rev: Ads on Play revenue
- # of Apps: # of app package
- App Usage: data is only available for ~220k apps and games but should cover most of app usage since it’s top heavy.
- The data is sourced from lockbox (sample of ~60% Android users) and extrapolated.
- Installs: includes pre-installs. Pre-installs are the apps that come pre installed on a device and are counted when new devices are activated.
- Besides GPB Rev and Ads Rev split, all H1’20 Metrics exclude apps that are inactive as of 08/20. Apps may monetize during H1’20 but became inactive since then.
- All metrics excluding Google 1P apps.
- Notes on individual app usage and install:
- some apps with high levels of installs and usage, such as Facebook (506M installs, 0.6% of total, and 220.6B hrs, 18.6% of total), Instagram

- (294M install, 0.4% of total, and 79.9B hrs, 6.7% of total), Netflix(194M installs, 0.2% of total and 14.7B hrs of usage 1.2% of total) are in the “Apps w. GPB” segment because they had spend in H1’20.
- Spotify: 115M install, 0.1% of total, and 1.9B hrs, 0.2% of total (Spotify is off GPB).

5% of Apps/Games represent 80%+ of Play revenue

Majority of apps monetize via in-app ads or selling physical goods



...Including Very Large and Prominent Apps

2020F represents actuals from Jan - July 2020 and v7 Forecasts
Source data

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- Some
- some apps with high levels of installs and usage, such as Facebook (506M installs, 0.6% of total, and 220.6B hrs, 18.6% of total), Instagram (294M install, 0.4% of total, and 79.9B hrs, 6.7% of total), Netflix(194M installs, 0.2% of total and 14.7B hrs of usage 1.2% of total) are in the “Apps w. GPB” segment because they had some spend in H1’20 even though it was minimal.
- Spotify: 115M install, 0.1% of total, and 1.9B hrs, 0.2% of total (Spotify is off GPB).
- Segment definition
- “Apps w. GPB” : Monetized apps with spend > $0 for H1’20 at app package level.

Slide 5

1 we discussed w/ Sameer removing everything but the left most column and total revenue column and including logos of devs as examples
Samer Sayigh, 8/19/2020

1 We will adjust the columns, but the segmentation change may still make sense. Ricky, if you can share more about the "primarily GPB" perhaps we could use for the "v2" version? The issue is that if we only use w/ GPB and w/o GPB, we have to put the likes of Facebook in "w/GPB".
Josh OConnor, 8/19/2020

1 the logic I used is that if the app/game has less than 8 cents ARPU (monthly spend/MAU) in developed user markets, it is estimated to be using something other than GPB as primary business model

We get the following list of apps/games based on this logic:
https://docs.google.com/spreadsheets/d/12WFsNSplto4c07crWekAJHeBWxWSM91rJ3g82YXFn4o/edit#gid=452804661
Ricky Singla, 8/20/2020

2 here is the summary once you take that into account:
https://docs.google.com/spreadsheets/d/12WFsNSplto4c07crWekAJHeBWxWSM91rJ3g82YXFn4o/edit#gid=1452298182
Ricky Singla, 8/20/2020

1 Josh O'Connor @google.com Divya Chandra@google.com Ricky Singla@google.com

I think Ricky & team created ARPDAU thresolds to classify Installs / Usage into something more like "Primarily GPB" vs "Primarily Non-GPB".

However, I think we can just remove as well.
Mike Marchak, 8/20/2020

3 couple of additional points: 1) this is an estimation and should be highlighted as that 2) Only did for apps /games with MAU greater than 100k as it does only really matter to classify the bigger apps and games correctly
Ricky Singla, 8/20/2020

Play’s Business Model

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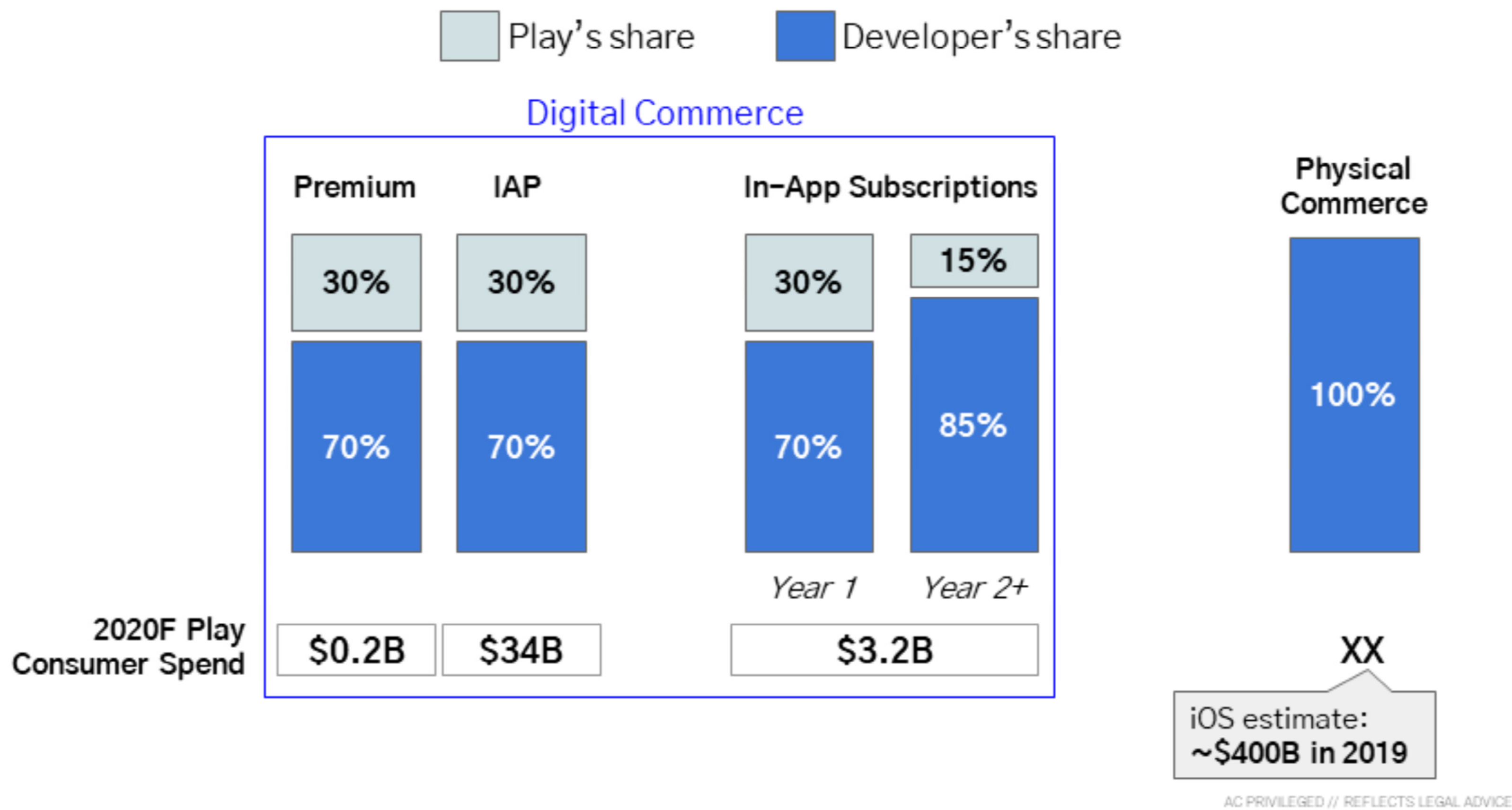
Play's current business model (public terms)



In addition, Play has six commercial programs to address developer needs and economics in a targeted manner

Category *(qualifying developers only)*		Commercial Program	Play Revenue Share	Program Rationale	Qualifying Dev #	Qualifying Dev Spend, as % of total Play Spend
Games	**Top Managed**	Games Velocity Program	**30% (reinvest ~5% in-kind)**	- Ensure major game titles launch on Play - Ease Play revenue share agitation - Deepen x-Google relationships	21	18%
Apps	**Top Managed**	Apps Velocity Program	**30% (reinvest ~10% in-kind)**	- Boost x-PA value delivered - Boost integration with Play Billing	20	~3.5%
	LiveTV	LRAP++	**7.5%**	- Boost integration w/ Android / Google TV - Accommodate constrained dev margins	10	<1%
	Video *(SVOD)*	LRAP	**15%**		55	~1%
	Music	ADAP	**15%**	- Boost integration w/ Auto, Wear, TV, & Cast - Accommodate constrained dev margins	11	<1%
	News	Subscribe w/ Google	**15%**	Part of Google News Initiative (GNI)	300	~1%
				Total:	***~400***	***~25%***

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Our business model and price are consistent with several comparable platforms

Platform Type	Store	Platform Share
App Stores	Apple App Store	30% (15% for subscriptions after 12 months)
	Amazon App Store	30% (20% on streaming video subscriptions)
	Samsung Galaxy Store	30% (20% for "premier partners")
	One Store	20%
	Microsoft Store	30% on games | 15% on apps
Gaming Platforms	Steam	30% for sales below $10M | 25% between $10 and $50M | 20% above $50M
	Nintendo	30%
	PlayStation	30%
	Xbox	30% (15% for non-video game subscriptions)
	Epic Store	12%
	Facebook instant games	30%
Physical Commerce	Amazon.com	8-17%
	StubHub	37%
	TicketMaster	31%
	Uber	25%
	AirBnb	14-20%

Source: Analysis Group

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- Tim

Pros and Cons of Play's current business model

Support for ···

- "Industry standard"
- Enables free to play model, which is good for consumers
- Aligns w/ devs – they earn, we earn
- Levels playing field – enables services for broad spectrum of devs
- Addresses margin-constrained devs via targeted commercial programs

Issues we hear ...

- 30% perceived as a big number
- Requires usage of Google's Billing system
- Potentially misaligned w/ value delivered <u>in few cases</u>:
  - Devs who retain paying users for long periods (e.g. Supercell, Netflix)
  - Hyper-local devs who rely on few FOPs (e.g. NCSoft in Korea)
  - Large brands who don't rely as heavily on Play UA / discovery (e.g. Tinder)

How developers perceive Play's value

How developers perceive our value

Detailed later

Operating System + Developer Tools

Amazing devices built and sold by OEM ecosystem

SAMSUNG

oppo

vivo

mi

NOKIA

Google Play

Developers do not know how to value these

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Play delivers value to developers in four primary ways

<dark blue> - included in following slide

User Acquisition	Play–owned discovery *(e.g. PREX, Top charts, cat search, pre–reg, SMERCH)*
	Engagement *(e.g. LiveOps, instant games, YT/Play integration)*
Monetization	Payments *(WW FOPs, Fraud protection, customer support incl refunds)*
	Buyer creation & Spend stretch *(e.g. Cart abandonment, Play Points, notification center)*
Distribution	Publishing & distribution *(e.g. WW distribution, device targeting, APK improvements)*
	Trust & safety *(Play Protect, anti–piracy, ML models for malware, app signing)*
Dev Tools & Services	Dev Tools, Analytics and insights *(e.g. Android Studio, store listing experiments, Console analytics)*
	Professional services *(e.g. growth consulting, Dev Tech & Dev Rel support)*
	Audience management *(e.g. reviews, comments)*
	Play Services *(e.g. GMS Core APIs)*

Source: Play value analysis, Samsung workshop, Lion Force proposal

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- Play value to be discussed separately (led by Mike's team analysis and Ravi's teams analysis). Approximate calculations
- Discovery value estimated by calculating: Avg CPI * # of organic installs * discount factor for re-installs/search
- Estimated engagement value focused on liveops campaigns (0.7 * incremental spend from LiveOps events)
- Estimated payments value using blended avg dev cost to set up FOP 4.
- Buyer creation: 0.7 * incremental buyers created with Play 1P efforts * annual spend/buyer * discount factor for promotional buyers;
- Spend stretch: 0.7 * 5% spend lift across 80% of Play revenue covered by Play Points program in steady state 5.
- Delivery value: TB delivered * GCP delivery rates 6.
- Growth consulting: ~$75M incremental Play revenue in 2018 across 1K consultations
- Notes:
- YT / Play integration (Supercell lootdrops after watching video)
- Play owned discovery: $45B is so much bigger than if they turn up Ads in the store. Potential rationale:
  - Play is generating more value than what it is capturing (some long tail of devs wouldn't pay for the the value of what we are providing)
- Growth consulting: 1K consultations over the last 1.5 yrs, ~250M / year incremental consumer spend; Ads consulting also likely have same rough

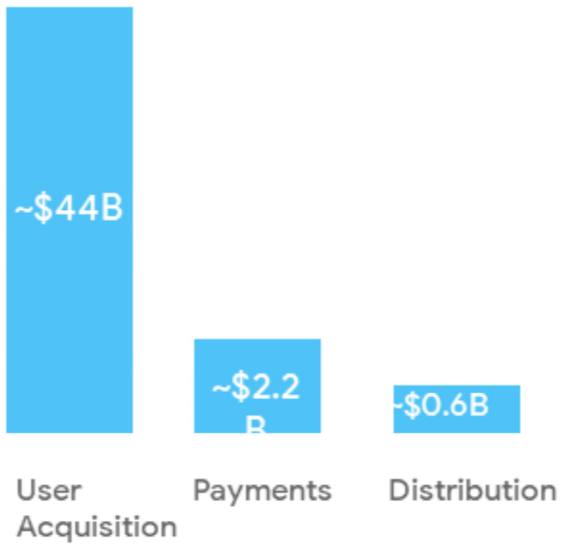
- order of magnitude value
- A/B testing: alternatives is Plum (charge in scaled way based on users and # of experiments)

- Additional value not depicted:
- Custom store listings across Geo
- Custom Ads based on user journey
- Subscriptions

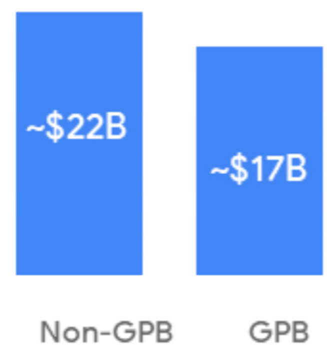
Thought Exercise: Estimating developer's perceived value

Note: only includes 3 of 10 components from previous slide (so model likely underestimates total value perception)

Play Value Delivered



Play Value Recipients



Note: Based on "genre CPI" approach to estimate user acquisition

"Modeled Developer Value" (MDV) is a theoretical vs. precise value, and doesn't nclude the complete set of resources or investments required to build and maintain the products, or the complete set of products and services provided to devs. They are based on assumptions on the perceived value of Google services to a developer that may not be accurate. They are also built to guide specific decisions and are not appropriate for guiding investments outside of those specific scenarios (e.g., Google level investments, decisions for another product area)

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Slide 14

2 Yes...will confirm but am waiting for APAC to come online
Mike Marchak, 8/19/2020

3 Methodology was that anyone w/ over $100 in spend was counted as GPB dev.

We then manually removed some of the GPB devs that didn't make sense as counting as GPB: Facebook, Snap, Bytedance, Amazon, MS, Leap, Yandex, OLX, VK, IMO & Twitter.
Mike Marchak, 8/20/2020

2 Mike Marchak@google.com - can we check to see that these numbers dont include big players like FB that use GPB sparingly?
Paul Feng, 8/20/2020

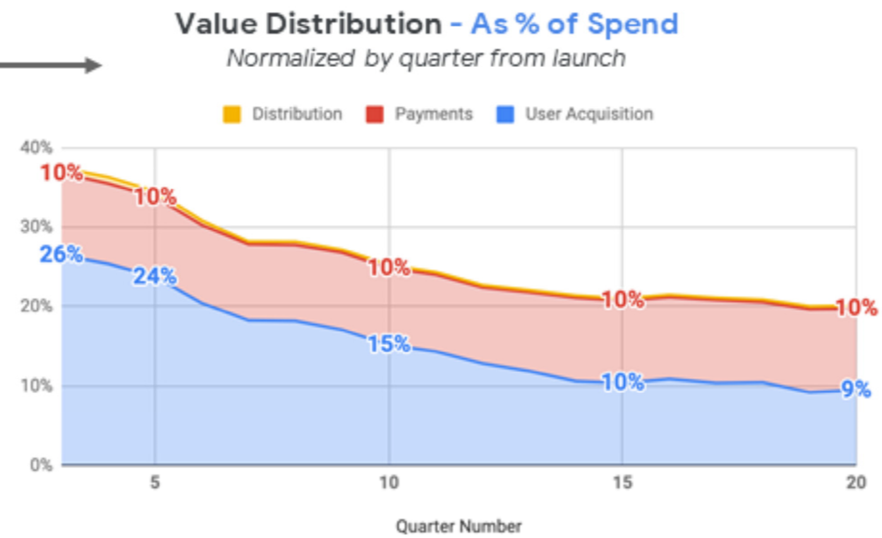
4 But clearly the primary portion of the value created for these devs would be in the Non-GPB bucket. So we could add to there, but doesn't change the narrative much.
Mike Marchak, 8/20/2020

Play Value perceived varies during app/game lifecycle & by user characteristics

Perceived Play value:

- **Declines over time**
- **Varies as dependence on new user discovery changes across titles & time**
- **Is distorted by perception of "fairness"** (ie, UA taken for granted since Netflix/FB/Uber/etc don't pay)

Note: Play value estimates a surplus in value creation for games overall. Where gaps exist, 80% is among the top 30 game devs.



* Based on top 1000 games by 2018 consumer spend launched before 2018Q3
*Delivery Value is 1-2%, so removed labels to simplify graph

"Perceived Developer Value" (PDV) is a theoretical construct and not a precise value. PDVs are not complete in that they do not include: the full set of customer revenue streams to developers; resources or investments required to build and maintain the products; nor do they include the complete set of products and services provided to developers. They are based on assumptions on the perceived value of Google services to a developer that may not be accurate. They are also built to guide specific decisions and are not appropriate for guiding investments outside of those specific scenarios (e.g., Google level investments, decisions for another product area)

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Slide 15

3 I think slides 9, 10 in this deck are probably the best ones:

https://docs.google.com/presentation/d/1sZqgOLEMKdG2jj5L_aLH6OOxPkxEZT93iL7sj0k2_uE/edit#slide=id.g5f735dde81_14_34
Paul Feng, 8/20/2020

4 Mike Marchak@google.com to see if he has a better one.
Paul Feng, 8/20/2020

5 there is a better one. I'll find ASAP
Mike Marchak, 8/20/2020

6 Added a simplified version as the first slide in the Appendix.
Mike Marchak, 8/20/2020

2 Paul Feng @google.com

is there a slide from the past that shows this ?
Sameer Samat, 8/20/2020

7 Please keep in mind this stat only applies to games. For Apps, this analysis is difficult to cover the nuance of this conversation since many top apps either don't use our billing or use billing for a portion of users.
Mike Marchak, 8/20/2020

Business model options we've considered

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Business model options we've considered

	1 Status Quo *(including targeted commercial programs)*	2 Differential Public Rev Share Change	3 Ad-based	4 Charge for individual Services / Assets	5 Charge for physical goods
	- Keep rev share as is - Optimize & expand commercial programs	- Reduce rev share X months post 1st purchase - Regressive rev share (volume discount) - Reduce rev share on non-Play owned install - Reduce apps rev share	Increase ad-load (potentially alongside rev share cut)	Charge for Play services individually (e.g. distinct fees for UA, distribution, payment processing, + analytics / tools)	Expand Play's business model to physical products
Play Revenue Impact	NA	~$1-4 Billion	$X	TBD	TBD
Pros	Targeted approach	Potentially reduce agitation Different from Apple	Diversify away from IAP Linked to Value	Better link price with value	New rev streams
Cons	Execution complexity	Margin erosion Slippery slope Priced under market	UX deterioration Difficult for smaller players	Breaks innovation Startups may not be able to afford	Agitation from new devs

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Thought exercise: Rev share options previously evaluated

1: Time since user's 1st purchase

E.g., Month 1 — e.g. 30%

E.g., Month 13+ — e.g. 15%

Rev. Δ $1.1 Bn–3 bn[1]

+ Aligns with some dev's perception of Play value
+ Aligns with subscriptions precedent
+ Reduces oppty for 3P stores to differentiate on price over the long-term

- Play's share of total value declines if new installs become less common
- Doesn't reflect value of Play re-engagement

2: Lifetime spend per App

Threshold n — E.g., $250M — e.g. 15%

Threshold 2 — E.g., $50M — e.g. 20%

Threshold 1 — E.g., $5M — e.g. 25%

e.g. 30%

$3.4 Bn[2]

+ Simple, transparent, has precedent
+ Promotes consolidating spend on Play
+ Focuses benefit on where risk is concentrated (large devs)
+ Easy to add discount to help startups

- Not tied to Play value
- Bad optics: most benefits large devs

3: Individual user spend per App

e.g. $500+ — e.g. 15%

e.g. < $500 — e.g. 30%

TBD

+ Aligns with some dev's perception of Play value
+ Reduces oppty for 3P stores to differentiate on price over long-term

- Doesn't reflect value of Play re-engagement; disincentives investment
- Play's share of total value declines if new installs become less common

4: User acquisition channel

Play Owned[1] (~60% of revenue) — e.g. 30%

Dev Owned[2] (~40% of revenue) — e.g. 15%

$2.7 Bn[1]

+ More developer flexibility
+ Aligns value paid with value received by channel

- Incentivizes devs to focus on dev-owned channels → devs may de-value Play featuring/co-marketing and ask to opt-out
- Omits Play re-engagement value

Play Owned: Featuring, Rex, Categorical Search, Re-engagement / buyer activation (being explored)

Dev owned: Deep links, ads, Navigational search)

1. 2022 In-year impact assuming applied logic starting Jan. 2020
2. Thresholds for games as shown ($5M, $50M, $250M). For apps, modeled at $1M, $10M, and $100M. Timing as per note 1 above.

Slide 18

2 Also heard the feedback that we need to quantify the cost for each option, yes?
Josh OConnor, 8/19/2020

3 Divya Chandra @google.com Karen Shen@google.com
Josh OConnor, 8/19/2020

5 Feedback - need to include the bit about the complexity / cost of applying these models
Paul Feng, 8/19/2020

4 Whose AI is the "complexity / cost" point?
Josh OConnor, 8/19/2020

Appendix

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80% of perceived value gap concentrated in 30 game devs

Total Value is positive for GPB games, even more so when expanding to all Apps & Games

Title Bucket	Dev Count	Aggregate *(Positive - Negative)*	Positive Gap	Negative Gap	% of Total Negative Gap
Top 30 Game devs with gap	30	-$0.8 B	$0.0 B	-$0.8 B	80%
Other GPB Game devs	7k+	$1.7 B	$1.9 B	-$0.2 B	20%

80% of total gap is concentrated in 30 game developers

* 2018 consumer spend and revenue figures * titles based on those that had installs in 2018 and >$1000 in spend in 2018-2019H1
NOTE: Figures above use LTV model (vs CPI model used for ecosystem wide calculations). LTV is believed to be more accurate for devs that monetize exclusively with GPB

"Modeled Developer Value" (MDV) is a theoretical vs. precise value, and doesn't include the complete set of resources or investments required to build and maintain the products, or the complete set of products and services provided to devs. They are based on assumptions on the perceived value of Google services to a developer that may not be accurate. They are also built to guide specific decisions and are not appropriate for guiding investments outside of those specific scenarios (e.g., Google level investments, decisions for another product area)

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We have a set of guiding principles for our business model (and commercial programs) [DRAFT | For Discussion]

1. Value Delivered Play delivers value commensurate with our price
2. Aligned Incentives Developers are economically incentivized to build, grow, and innovate on Play
3. Equitable Play's terms create a level playing field; Play doesn't pick winners
4. Developer Profitability Developers of all types can build profitable businesses on Android
5. User Trust & Safety Users are provided a trusted and secure experience

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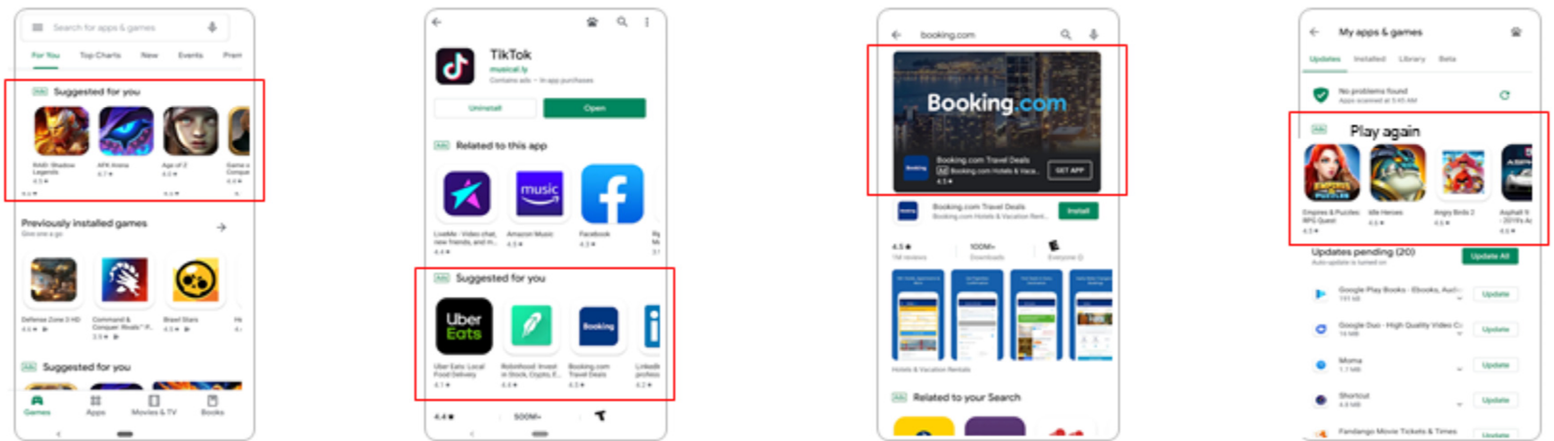
Ads could potentially offset revenue declines from other changes

	Today (~9% Ads*)	Increasing Ad Load	
Ads Revenue	~$3B	$xxB	Increased risk to user experience, need user studies to assess tipping point Need to work with Ads team to assess impact to ads ecosystem

Games/Apps Home | Details (pre and post-install) | Search | My Apps



*impressions

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- Advertising opportunity is not limitless
- Some moves (product questionable), but could make some quick adjustment to relieve pressure without significant impact to P&L
- Also, land in range of other market precedent custom deals (e.g. Samsung exclusive offer to top devs)

Deep Dive: Options for the Apps Business Model

	More Lenient	Status Quo	More Aggressive	Middle Ground
	Apps: Optional Billing	Biz Model + Policy Today	Policy Change	Policy Change + Public LRAP/ADAP + Reduced Subs Fee
Play Revenue Impact	% of $1.5B Apps Biz Leakage to Games Biz	Status Quo	$XXM upside	$XXM upside $XXXM cost
Pros	+ Separation from Apple + Dev choice	+ No new headlines at this time	+ Fair to all devs + Policy Enforcement	+ Separation from Apple + Addresses structural margin issues for all devs + Avoids LRAP/ADAP leak + Policy Enforcement
Cons	– $1.5B at risk – Potential user trust & security issues – Exaggerates Biz model concerns for game devs	– Fairness: Some devs use GPB, some don't – Fairness: Some devs get LRAP/ADAP, some don't – Policy Ops nightmare	– Doesn't address structural margin issues for all devs / industries – Aligns us with Apple	– Public LRAP/ADAP adds to games dev concerns – Managing edge cases of LRAP/ADAP eligibility

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Slide 23

8 Worth considering an option where only the Public LRAP would allow optional billing. I added a slide in the appendix w/ some ideas
Mike Marchak, 8/20/2020

9 This would be more defensible.
Mike Marchak, 8/20/2020

Case study - Illustrative Only

	Aging Superstar: 5+ years, $Bs later	New Hit Game: Launched this month	Subs App: Known Brand + Targeted Use
Consumer Spend (last month)	$21M	$31M	$19M
Monthly Active Users	60M	1.1M	41M
New Users from Play-owned channels (% of total MAU)	5%	55%	0.5%

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Slide 24

2 i think the last row seems most relevant. We're showing that Play-owned UA channels are less relevant for aging superstars and large brand subs apps, which may mean misalignment with our value delivered principle. suggest highlighting that more.

Also what's the difference between row 3+row 4?
Samer Sayigh, 8/20/2020

11 I had the same thought, I could remove row 3. It just shows that in general, new users become less important as titles age, and then even more so, that Play drive less for brands.

But can definitely delete row 3 to simplify.
Mike Marchak, 8/20/2020

10 Paul Feng @google.com Karthik Moorthy @google.com Samer Sayigh @google.com

Really simple case study showing how UA varies. Let me know if this is clear or if I should add some more colors / etc
Mike Marchak, 8/20/2020

3 +1
Samer Sayigh, 8/20/2020

Public LRAP

Expand LRAP / ADAP to cover all digital content industries with licensing/royalties that impact unit economics (ie, 50%+ of sale price goes to 3P content creator)

Option #1: Use Play Billing

- Targeting Music, Movies, Books, TV, etc
- Need to apply w/ Play for inclusion
- Enables 15% rev share for Subs & IAP starting on day 1, as unit economics start on Day 1
- Key integrations relevant to these verticals required for inclusion (Cast, GTV, Assistant)

Option #2: Roll your own billing

- Targeting Music, Movies, Books, TV, etc
- Need to apply w/ Play for inclusion
- Need to pass payments security review annually. Cost of program $10k/yr
- Requires savings is passed on to Play user** vs costs on other mobile platforms

Option #3: Consumption Only

**Play normally re-invest margins into the ecoystem, developing Android features for users, sharing w/ OEMs to develop better features, or invest in Play and programs like PlayPonts designed to give back to users. As we lose that ability here, we ask the developer to pass that savings on to uses in the ecosystem

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Slide 25

12 Would want to think about viability of LRAP+ if we head down this path.
Mike Marchak, 8/21/2020

13 How is this different than today?
Mike Marchak, 8/21/2020

Brainstorm questions

- How do we need approach addressing exception cases of value mismatch/ agitation
  - Broad based changes (which will have commercial impact to Play margin) (or)
  - Accelerate and amplify commercial deals to scale partner needs

- What will the revenue impact of business model changes be?
- Potential Ways to Expand Biz Model & Increase Value Alignment + Equitability
  - Charge for UA in some way. Role of Ads? Different rates for different UA channels?
  - Can / should we charge non-GPB / digital-goods devs? Make Play billing required to be an “option” for these industries?

Play Value Model

Able to model 3 components:

- Excludes value of Android platform, dev tools, Play Points, etc

Discovery	**LTV-based**: (First time Install Count) * (180d LTV) **CPI-based**: (First time Install Count) * (Genre CPI)
FOP	(Spend by FOP) * (Cost to replicate FOP txn)
Delivery	(Volume Delivered) * (Cloud Pricing)

"Modeled Developer Value" (MDV) is a theoretical vs. precise value, and doesn't include the complete set of resources or investments required to build and maintain the products, or the complete set of products and services provided to devs. They are based on assumptions on the perceived value of Google services to a developer that may not be accurate. They are also built to guide specific decisions and are not appropriate for guiding investments outside of those specific scenarios (e.g., Google level investments, decisions for another product area)

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Games Velocity Program: Unify and boost Google's value proposition to target developers, via expanded offers and service level

Four new cross-Google "service packs", across the developer lifecycle

1 Build & Test

Boost reach of high-fidelity games on Android; reduce cost and friction

- Cloud credits[NEW]
- Android Dev Tech & Cloud consultations[NEW]

2 Launch

Enable bigger and more far reaching launch moments

- Play 'Growth Consulting'
- Co-marketing campaigns
- Play Store featuring
- YT influencers[NEW]

3 User Acquisition

Boost volume and efficacy of new user acquisition

- Ads credits[NEW]
- Ads consultations & ML integration[NEW]

4 Community Development

Build gaming communities to engage users

- eSports tournaments & gaming events[NEW]
- YT channel growth[NEW]
- eSports sponsorships[NEW]

x-PA "Partner Pod" to coordinate x-PA service delivery to developer

Denotes consultative services which (1) bring unique Google know-how to devs, and (2) amplify value of other investments (e.g. credits)

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